

# INTRODUCTION

Pursuant to section 25.075, Florida Statutes, the Supreme Court of Florida developed a uniform case reporting system. The Summary Reporting System (SRS), as it is commonly known, provides the Office of the State Courts Administrator (OSCA) with data which assists the Supreme Court in its management and oversight role. While the SRS data is used as a workload measure for judges, it is not intended to measure the efficiency of the judiciary, state attorneys or public defenders. The primary purpose of the SRS is the certification of need for additional judgeships. Under the provisions of Article V, Section 9 of the Florida Constitution, the Supreme Court is responsible for determining the need for additional judges in the appellate districts and the judicial circuits. This provision excludes Supreme Court justices. The SRS data provides the primary data to project the need for additional judgeships. The *Certification of Need for Additional Judgeships* process uses weighted caseloads in order to project future workload for judges. This analysis takes into account the complexity of cases filed and the time needed to process them.

In addition to *certification*, SRS data is used for the formulation of budgets, the preparation of legislative fiscal notes, the impact assessment of proposed legislation or court rules, and as an information resource for all courts, criminal justice agencies, news media and the general public.

Listed below are examples of projects which rely on the standard reporting of SRS data.

- ? *Performance and Accountability / Long Range Program Plan / Performance Based Budgeting* rely on the number of cases filed and disposed to identify performance indicators for core functions of court activities. These indicators measure the outcome and performance of the court activity for planning and budgeting purposes.
- ? *Funding Methodologies* uses the number of cases filed to allocate dollars from various trust funds (i.e., Court Education Trust Fund, Article V Trust Fund, Small County Courthouse Trust Fund, Alternative Dispute Resolution Trust Fund, and the Family Court Trust Fund). The distribution of cases filed by circuit/county are used to distribute funds equitably.
- ? *Revision 7 Planning* uses the number of cases filed and disposed to analyze expenditure information provided on the Article V Cost Inventory (i.e., Drug Court, Jury Management, Pretrial Diversion Programs, etc.).
- ? *Clerks of Court* are provided aggregate data on filings, dispositions, and post judgement activity. This allows the clerks to track their submissions for accuracy. In addition, counties submitting criminal data via the Offender Based Transaction System (OBTS) are provided case specific audit trails.
- ? *Public Information Requests* include providing descriptive or analytical statistics on filings, dispositions, post judgement activity, and statute specific (OBTS counties only) issues. Public information requests are received from the media, other local, state and federal agencies, the legislature, state attorneys, public defenders, and the general public.

The **Florida State Courts System Summary Reporting System (SRS) Manual** has been

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updated and enhanced to incorporate the technical memorandums which have been released since 1995, as well as other changes which have been made to either clarify or change reporting requirements. In addition, the changes in the SRS Manual also reflect feedback from clerks' staff derived from a large sample of participating jurisdictions statewide. Due to the critical and varied uses of SRS data, it is imperative that each county report the data in a consistent and uniform manner. Such reporting will help ensure that the SRS is accurate and reliable. This manual was designed to assist in this endeavor.

The OSCA strives to make SRS reporting more effective and efficient. Therefore, in an effort to assist those who work with SRS or on SRS-related issues, we designed the 2002 SRS Manual to be as user-friendly as possible. To that end, the manual has been placed in a three-ring binder, such that future changes or enhancements to the reporting requirements may be incorporated without revising the entire document. Moreover, to increase accessibility, the SRS Manual is provided on the Supreme Court's web site at [www.flcourts.org](http://www.flcourts.org) under the *Judicial Administration* link. For convenience, the manual may be viewed or downloaded in HTML or Acrobat formats.

This manual includes examples and definitions to assist in the completion of the monthly SRS reports. We have also added a section to each court division, including OBTS, which lists Frequently Asked Questions (FAQ) on reporting different case scenarios. In addition, we have included the felony portion of the Florida Statute Table. The Florida Statute Table includes a listing of all **felony crimes** complete with the appropriate level and degree, as well as the correct SRS category in which a particular crime is categorized for SRS purposes. Furthermore, the statute table is also incorporated with a standard charge description, a description of the statute offense, the current status of the statute, and the year a statute was repealed if applicable.

The following design strategies incorporated in this manual:

- ? Each tab designates a specific section related to SRS reporting or provides detailed information and guidelines to assist you in completing the monthly reporting forms.
- ? The guidelines follow the format of the SRS reporting form and are preceded by an "U." Common reporting errors are preceded by an "Y."
- ? OBTS instructions and required data elements have been incorporated in the circuit and county criminal portions of the manual. All OBTS guidelines are formatted in shaded boxes. A detailed explanation of OBTS/SRS data compilations can be found under the tabbed section entitled OBTS.
- ? Frequently Asked Questions (FAQ) have been incorporated into the substantive sections for all court divisions to assist clerks in reporting difficult case scenarios.

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- ? SRS audit requirements and audit trail specifications are presented in the tabbed section entitled Audit Trails.
- ? The Florida Statute Table, reflecting SRS category determinations, degree of offense, and offense
- ? A glossary of data definitions and terms are provided in the tabbed section entitled Glossary.

### Preparation of SRS Reports

The following procedures will help ensure consistent reporting from all counties:

- ? Each reporting category should be completed. If no reporting activity occurred during the month, insert a zero into the category in question.
- ? Computer generated reports are acceptable **if** they are in the same format and design as the SRS forms.
- ? The SRS reports should be submitted on 8½ × 11 inch paper with a portrait orientation, **in page number order**, and with a staple in the top left hand corner.
- ? The SRS reports should be reviewed for accuracy before submission to the OSCA. Check for data entry errors or omissions to the report.

### Verification of SRS Reports

The following procedures are used by the OSCA to verify the monthly SRS reports submitted by the county:

- ? Upon receipt of the SRS report, OSCA staff will review the data for accuracy. If errors are detected on the SRS report, the county will be contacted to assist in their correction.

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## Submission of SRS Reports

- ? Submit your complete SRS report for all court divisions to the OSCA by the 15th day of the succeeding month. The SRS report should be sent to:

Office of the State Courts Administrator  
Court Services  
Supreme Court Building  
500 South Duval Street  
Tallahassee, Florida 32399-1900

- ? If applicable, submit your SRS criminal data submitted through the OBTS so that the OSCA receives your tapes and diskettes by the 15th day of the succeeding month. The OBTS tapes and diskettes should be sent to:

Office of the State Courts Administrator  
Court Services---OBTS Unit  
Supreme Court Building  
500 South Duval Street  
Tallahassee, Florida 32399-1900

**Note:** Summaries of SRS data will be provided to the county by Court Services on a quarterly basis.

## Amending SRS Reports

- ? If a county discovers a discrepancy on an SRS report already submitted to the OSCA, the county should prepare an amended SRS report and submit it to the OSCA immediately.
- ? When submitting an amended SRS report for a division of court, the amended report should reflect only the data (reporting categories) to be amended.
- ? Highlight the change and type **Amended Report** at the top of the form.
- ? If a computer-generated report is modified with all reporting categories listed, then all amended figures must be highlighted to facilitate accurate data entry.
- ? Amended SRS reports may be submitted at any time. However, the OSCA will not accept amendments that are more than 3 years old.

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## Questions Concerning SRS/OBTS Reporting Requirements

- ? Questions regarding the preparation of SRS reports, the SRS reporting requirements, the submission of OBTS tapes or diskettes, and OBTS technical issues can be directed to Court Services staff (850) 922-5094 or Suncom 292-5094.

## SRS Training

- ? SRS training workshops are provided by court services staff at no cost and are tailored to address the specific training needs of the county. To schedule a training workshop for your jurisdiction, please contact Court Services staff at (850) 922-5094 or Suncom 292-5094.

## SRS Forums Group

- ? As an additional training resource, Court Services has created the SRS Forums Group, an Internet-based bulletin board dedicated to the exchange of information related to the SRS reporting requirements. The forums are moderated by Court Services staff and have been developed as a part of our initiative to enhance the efficiency of SRS training, and consequently improve the overall accuracy of SRS data. To participate in the group, simply navigate to **<http://forums.flcourts.org>**. Select the Register link on the top right portion of the page. Provide the requested information. Once you have registered, you have access to read, reply or post messages or questions related to all facets of the reporting process. For your convenience, forums are identified by division of court.
- ? Any problems you encounter while attempting to access the SRS Forums Group should be reported to the forums moderators, at 850-922-5094 or via e-mail at [funderbf@flcourts.org](mailto:funderbf@flcourts.org). As you familiarize yourself with the protocol for participating in the group, please provide feedback to the moderators regarding potential improvements. We are striving to make this site as informative and user-friendly as possible. Subject matter expert input is an invaluable resource to ensuring that these forums continue to provide valuable information.